

DM tool + Clinical  
experience + Value-added  
services

Fig. 1

# How the Money Flows Around the *NETWORK*

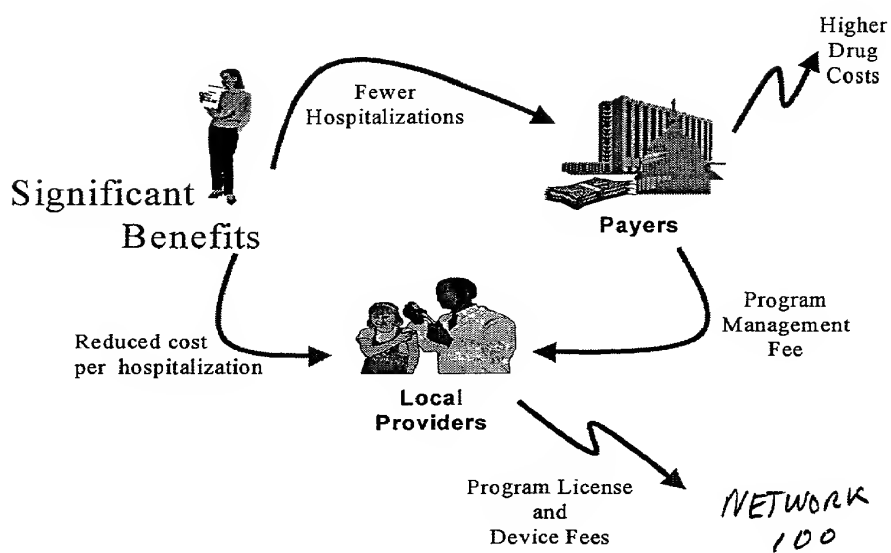
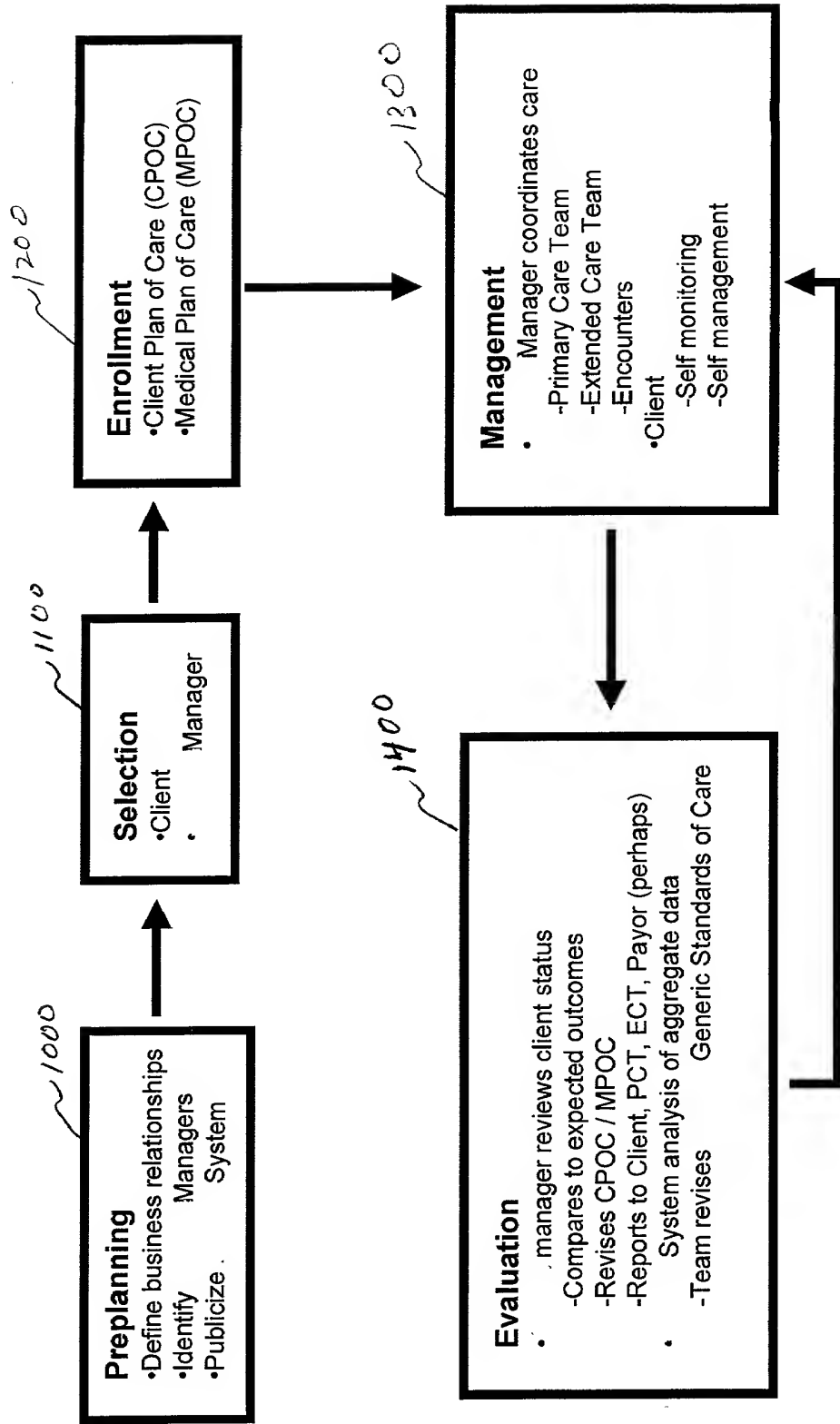


FIG. 2



PCT: Primary Care Team (concerned with primary diagnosis, i. e. CHF)  
ECT: Extended Care Team (concerned with other medical conditions)

FIG. 3

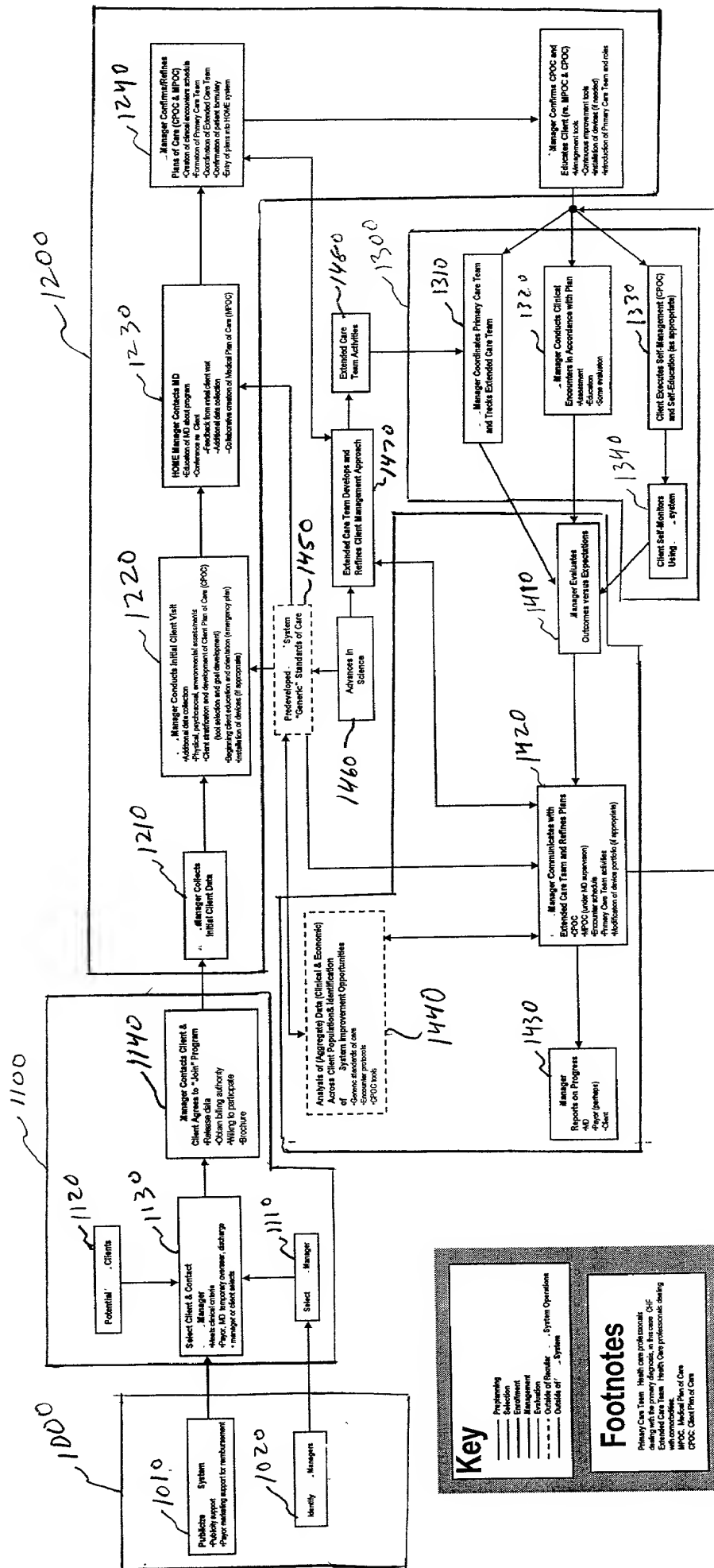


Fig. 4



Care Steps	Roles & Responsibilities					System
	Client	Physician	Payor	Manager	Primary Care Team	
1. Select Client for program	<ul style="list-style-type: none"><li>May inquire of Manager regarding program participation</li></ul>	<ul style="list-style-type: none"><li>Uses "Inclusion and Exclusion" criteria to evaluate client for program.</li><li>Calls with client recommendation</li></ul>	<ul style="list-style-type: none"><li>Uses "Inclusion and Exclusion" criteria to evaluate client for program.</li><li>Calls with client recommendation.</li><li>Coordinate with hospital discharge planners</li></ul>	<ul style="list-style-type: none"><li>Receives client recommendation</li></ul>		
2. Manager contacts client, and client agrees to join program	<ul style="list-style-type: none"><li>Receive call from manager and verbally agree to participate in the program.</li><li>Schedule date for visit with manager</li></ul>	<ul style="list-style-type: none"><li>Receive notification of client agreement to participate in program</li></ul>	<ul style="list-style-type: none"><li>Receive notification of client agreement to participate in the program</li></ul>	<ul style="list-style-type: none"><li>Contact referred client,</li><li>describe program</li><li>elicit verbal agreement to participate</li><li>ask brief summary questions to determine if patient meets inclusion criteria</li><li>Notify payor &amp; MD, of client agreement to participate.</li><li>Schedule date for visit with client.</li></ul>		<ul style="list-style-type: none"><li>Lists all clients selected as potential clients.</li><li>Lists clients who agree to participate.</li><li>Lists clients who do not agree to participate</li></ul>

Exclusion	Criteria
1. Unable to read or speak English	4. Younger than 18 years old
2. Deaf	5. Unwilling to have telephone

**Inclusion Criteria**

1. Primary diagnosis of CHF.
2. High risk of future admissions.

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Roles & Responsibilities					
Care Steps	Client	Physician	Payor	Manager	System
3. Manager collects initial client data	<ul style="list-style-type: none"> <li>Shares information required for initial enrollment</li> </ul>			<ul style="list-style-type: none"> <li>Collects demographic data for enrollment</li> <li>Enters initial data into system</li> </ul>	<ul style="list-style-type: none"> <li>Receives initial data entry for enrollment</li> </ul>
4. Manager conducts client visit	<ul style="list-style-type: none"> <li>Stays for visit</li> <li>Participates in visit by sharing accurate information</li> </ul>			<ul style="list-style-type: none"> <li>Receives client signatures on agreement to participate</li> <li>Medical information release</li> <li>Full of rights</li> <li>Conducts client interview</li> <li>Medical history</li> <li>Physical, psychosocial, environmental, risk factor assessment</li> <li>SF 36</li> <li>Sets &amp; instructs emergency plan</li> <li>Orients client to system</li> <li>Installs devices as needed</li> </ul>	<ul style="list-style-type: none"> <li>Receives acknowledgement of agreement to participate</li> <li>Medical information release</li> <li>Full of rights</li> <li>Receives history, assessment and survey data</li> <li>Receives emergency plan</li> <li>Acknowledges link with client interactive devices, eg BP, Scale, ECG</li> </ul>
5. Manager contacts MD		<ul style="list-style-type: none"> <li>Receives call from Manager</li> <li>Shares important information re client</li> </ul>		<ul style="list-style-type: none"> <li>Contacts primary and extended care MD's regarding client care</li> <li>Educates MD regarding program as needed</li> <li>Conferences with MD re: initial assessment data</li> <li>Results of data collection tools</li> <li>Initial physician-set MPOC</li> <li>Enters MPOC, assessment data &amp; data collection results into system</li> </ul>	<ul style="list-style-type: none"> <li>Receives entry of MPOC, assessment data, and data collection results</li> <li>Places information into appropriate format</li> </ul>
6. Manager confirms & refines plans of care (CPOC & MPOC)		<ul style="list-style-type: none"> <li>Receives MPOC from Manager and signs confirmation</li> <li>Communicates any discrepancies</li> </ul>		<ul style="list-style-type: none"> <li>Based upon initial assessment data, data collection results and MPOC's for heart failure and comorbidities, the Manager forms the primary care team</li> <li>Creates the clinical encounter schedule</li> <li>Coordination with Extended Care Team</li> <li>Confirmation of patient formulary</li> <li>Develops initial client plan of care</li> <li>Enter CPOC into system</li> <li>Send MPOC &amp; CPOC to MD for confirmation</li> </ul>	<ul style="list-style-type: none"> <li>Receives completed encounter schedule</li> <li>Confirms patient formulary with the Manager</li> <li>Receives MPOC &amp; CPOC from Manager</li> <li>Sends encounter schedule to client's web TV</li> </ul>

FIG. 7

Care Steps	Roles & Responsibilities				
	Client	Physician	Payor	Manager	Primary Care Team
7. Manager coordinates Primary Care Team and tracks Extended Care Team	<ul style="list-style-type: none"> <li>Participates in primary care team conferences as appropriate.</li> </ul>	<ul style="list-style-type: none"> <li>Notified of primary care team conferences</li> <li>Participates in team conferences as able, communicates concerns to Manager</li> </ul>		<ul style="list-style-type: none"> <li>Coordinates conferences with the Primary Care Team regarding the client's CPOC.</li> <li>Tracks changes in MPOC's set by extended care team members, communicates changes to primary care team.</li> <li>Confirms changes are addressed with the client and entered properly into the system</li> </ul>	<ul style="list-style-type: none"> <li>Participates in regular team conferences about client's CPOC &amp; MPOC.</li> <li>Advise regarding best CPOC for client.</li> <li>Contact client as needed regarding management issues -nutrition -medication -activity -finances -stress</li> </ul>
7. Manager conducts clinical encounters in accordance with plan	<ul style="list-style-type: none"> <li>Prepares for regularly scheduled encounters with HOME Manager</li> <li>Participates in regularly scheduled encounter with HOME Manager</li> </ul>			<ul style="list-style-type: none"> <li>Follows clinical encounter schedule and scripts</li> <li>Assesses client physical, and psychosocial response</li> </ul>	
7. Client executes Self Management and Self Education	<ul style="list-style-type: none"> <li>Integrates MPOC &amp; CPOC into lifestyle consistently</li> <li>Engages and follows self education modules</li> <li>Asks questions during regularly scheduled encounters</li> </ul>			<ul style="list-style-type: none"> <li>Tracks client responses to self-education modules</li> <li>Assesses for consistent integration of CPOC &amp; MPOC into lifestyle</li> <li>Answers questions during encounters, if unable to answer a question, refer to the appropriate team member.</li> <li>Responds as needed to "emergent", "urgent", or symptoms "of concern"</li> </ul>	<ul style="list-style-type: none"> <li>Tracks ongoing client utilization of self education modules</li> <li>Notifies Manager of client questions</li> <li>Alerts Manager of "emergent", "urgent", or symptoms "of concern"</li> </ul>
8. Client Self-Monitors using system	<ul style="list-style-type: none"> <li>Inputs daily weight and blood pressure measurements into system</li> <li>Inputs additional physiological data per MPOC, glucose, ECG</li> <li>Learns which values are normal and those outside desired limits</li> <li>Completes data surveys, SF-36, food diary as needed</li> </ul>	<ul style="list-style-type: none"> <li>Responds to Manager in an efficient and effective manner regarding physiological parameters outside desired limits, as needed</li> </ul>		<ul style="list-style-type: none"> <li>Tracks physiological data from client and responds to values outside normal limits</li> <li>Contacts MD as appropriate with values outside normal limits</li> <li>Tracks survey data, SF-36, food diary, stress audit</li> </ul>	<ul style="list-style-type: none"> <li>Receives daily input of physiological data</li> <li>Using preset parameters, determines if data is outside value limits</li> <li>Notifies Manager of values outside preset parameters</li> <li>Receives survey data, SF-36, food diary, stress audit, etc</li> <li>Tracks consistent input of survey data with schedule</li> </ul>

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Care Steps		Roles & Responsibilities				
	Client	Physician	Payor	Manager	Primary Care Team	Extended Care Team
<b>Evaluation</b>						
9. Manager evaluates outcomes versus expectations	<ul style="list-style-type: none"> <li>▼ Learns ongoing evaluation of personal response and outcomes to MPOC &amp; CPOC</li> </ul>			<ul style="list-style-type: none"> <li>▼ Reviews client data regularly</li> <li>▼ Evaluates whether data is consistent with expected outcomes</li> <li>▼ Communicates with client regarding inconsistent outcomes</li> </ul>		<ul style="list-style-type: none"> <li>▼ Archives, surveys, or sends data/messages from client to Manager for evaluation</li> </ul>
10. Analysis of aggregate, clinical & economic data across client populations identify system improvement opportunities				<ul style="list-style-type: none"> <li>▼ Evaluates aggregate clinical &amp; economic data with standards of care</li> <li>▼ -encounter protocols</li> <li>▼ -CPOC tools</li> <li>▼ Suggests potential System and care improvement opportunities</li> </ul>	<ul style="list-style-type: none"> <li>▼ Evaluates aggregate data, clinical, &amp; economic</li> <li>▼ Suggests potential System and care improvement opportunities</li> </ul>	<ul style="list-style-type: none"> <li>▼ Sends aggregate data to Manager and designated primary care team members</li> <li>▼ Supports additional data process analyses</li> </ul>
11. Manager communicates with primary and extended care team re client outcomes and refines plans	<ul style="list-style-type: none"> <li>▼ Learns ongoing evaluation of personal response and outcomes to MPOC &amp; CPOC</li> </ul>	<ul style="list-style-type: none"> <li>▼ Receives call from Manager regarding client outcomes</li> <li>▼ Modifies MPOC as needed</li> </ul>		<ul style="list-style-type: none"> <li>▼ Coordinates primary care team conference regarding patient outcomes</li> <li>▼ Communicates client outcomes to MD</li> <li>▼ Collaborates on plan (CPOC &amp; MPOC) refinement</li> <li>▼ Communicates with Extended Care Team regarding pertinent client outcomes and collaborates on plan refinement if appropriate</li> </ul>	<ul style="list-style-type: none"> <li>▼ Participates in conference/review of client outcomes</li> <li>▼ Collaborates in CPOC modification</li> </ul>	<ul style="list-style-type: none"> <li>▼ Documents all client specific communications</li> <li>▼ Receives MPOC &amp; CPOC refinements from Manager</li> </ul>
12. Manager reports on client progress	<ul style="list-style-type: none"> <li>▼ Receives client outcomes report from System</li> </ul>	<ul style="list-style-type: none"> <li>▼ Receives client outcomes report from System</li> </ul>	<ul style="list-style-type: none"> <li>▼ Receives member's aggregate report</li> </ul>	<ul style="list-style-type: none"> <li>▼ Initiates outcomes report creation and sends to client, MD, primary care team and payor</li> </ul>	<ul style="list-style-type: none"> <li>▼ Receives client outcomes report</li> </ul>	<ul style="list-style-type: none"> <li>▼ Reminds Manager when outcome's reports are due</li> <li>▼ Creates outcome reports per Manager's request</li> </ul>
6 / 10. Manager confirms refined plans and educates the client	<ul style="list-style-type: none"> <li>▼ Receives new instruction on refined MPOC &amp; CPOC</li> </ul>	<ul style="list-style-type: none"> <li>▼ Confirms refined MPOC</li> </ul>		<ul style="list-style-type: none"> <li>▼ Confirms and communicates refined MPOC &amp; CPOC to client, MD, primary care team and extended care team</li> </ul>	<ul style="list-style-type: none"> <li>▼ Receives refined MPOC &amp; CPOC</li> </ul>	<ul style="list-style-type: none"> <li>▼ Confirms refined MPOC</li> </ul>

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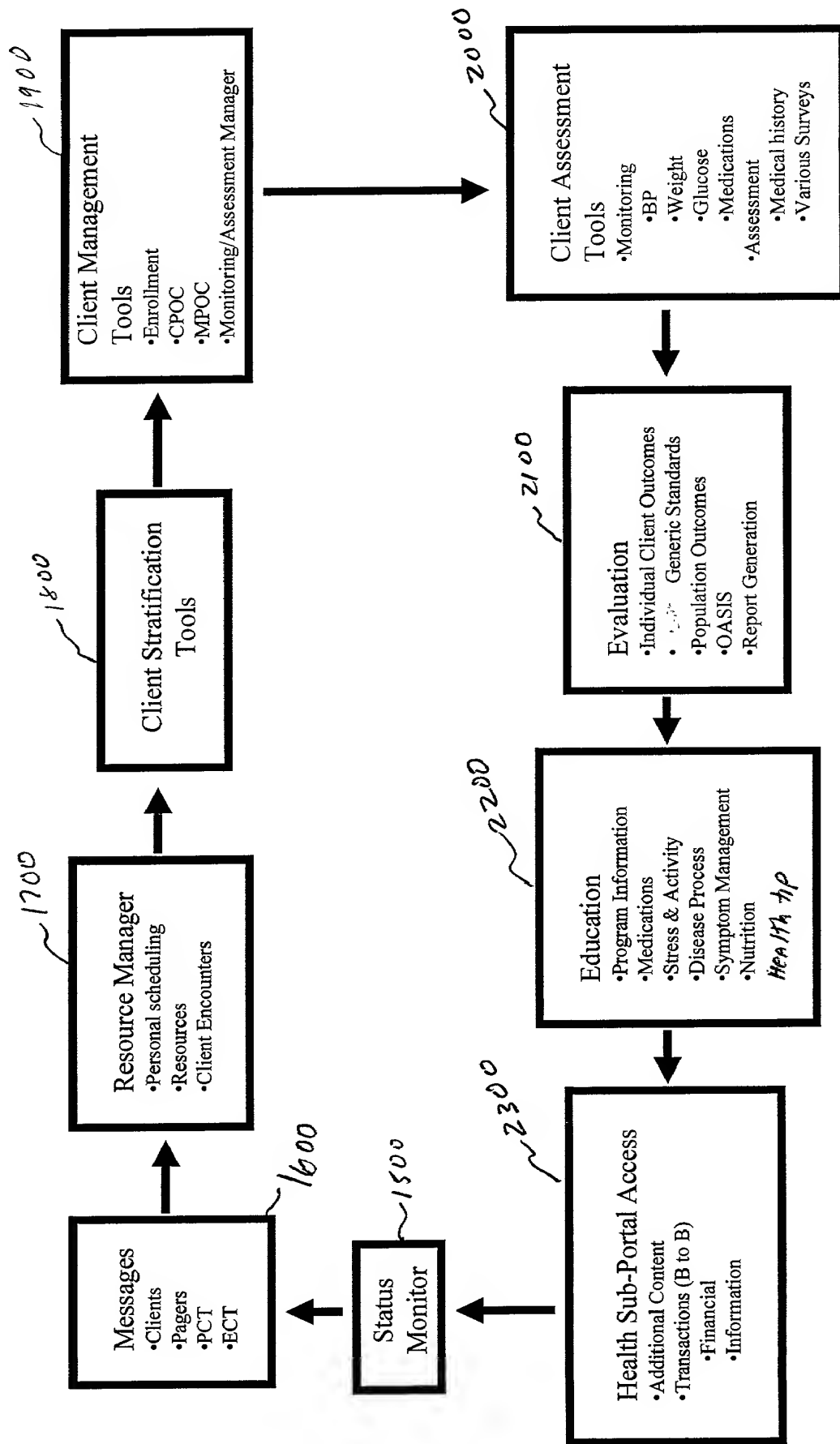


FIG. 10



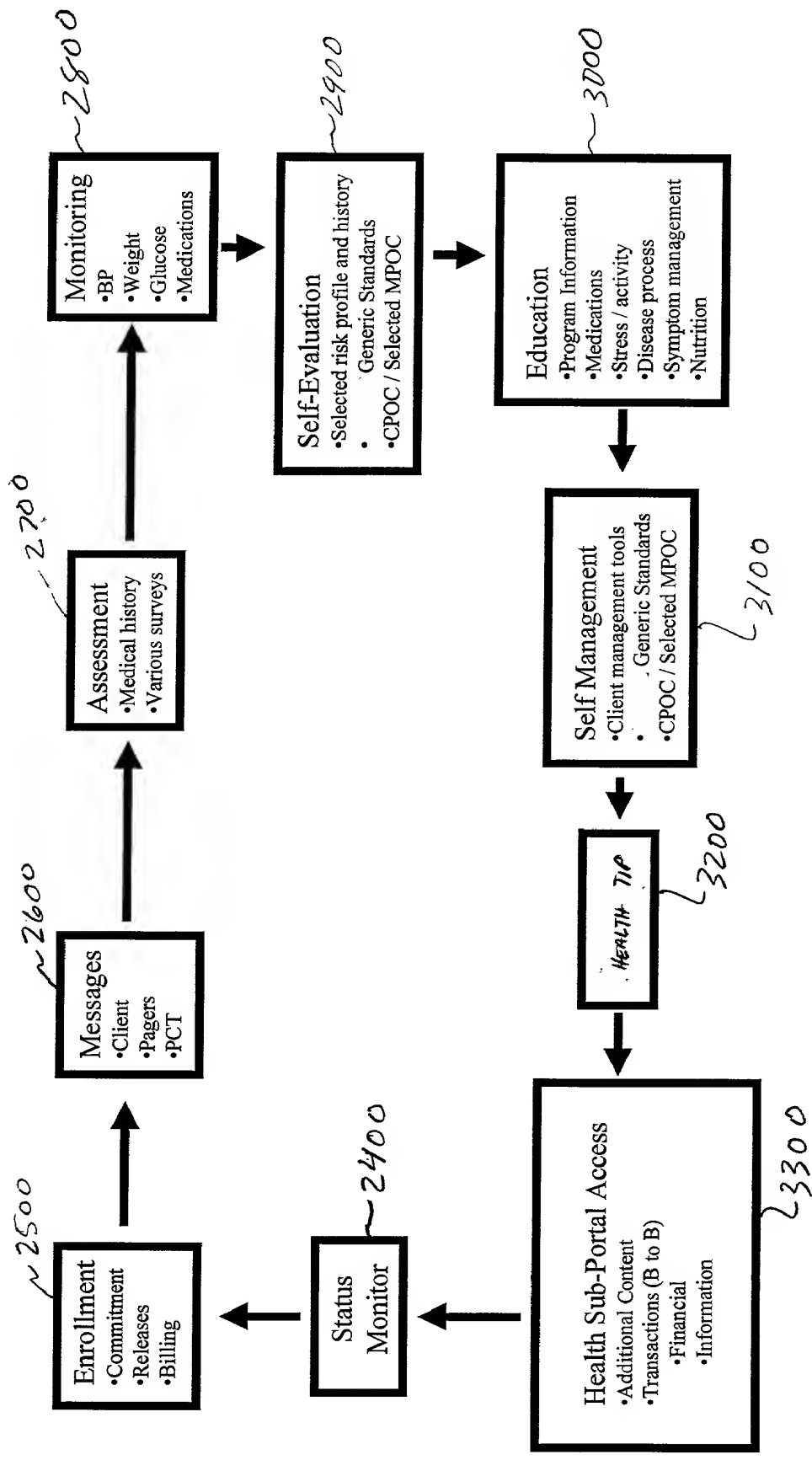


FIG. 12

